Adding New Users

This document applies to the following ERP system(s):

SunGard EAS

This guide describes the steps required to install BizInsight and BizContent for additional users in your organization.

This document presumes that BizInsight is installed and fully functioning for at least one user within your organization.

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Step 1: Locate Installation Files

In preparation for installation, you need to confirm which version of BizInsight is installed on current BizInsight users' workstations so that you are sure to install the same version being run elsewhere. To do this, open Excel on an existing BizInsight user's workstation and click on the **About** button of the BizInsight Excel ribbon.

Once you have determined the current version, click on the **Application Settings** button and copy the path provided for the Configuration Path parameter, open Windows Explorer and browse to that directory. Look in that directory or in the level above for an Install Files folder or a folder for the BizInsight version that is currently installed. Where the installation files have been saved will vary from customer to customer but it is recommended in our documentation that they be saved near the BizInsight shared directory so there is a high likelihood that you will locate the necessary installer in this location or nearby.

If you are not able to locate the installer files for the currently installed BizInsight version, download the latest version from the BizNet Software customer portal, (<u>http://biznet.flexnetoperations.com</u>). If installing you must install latest version, all client workstations and the caching service must be updated to the latest version. Follow the steps in the document titled "Applying Updates" for instructions. All files can be found under "Browse My Software and Documentation".

HOME > DOWNLOAD CENTRAL	HOME			
oftware & Services	Desimilated	Control Home		
ome	Download	Central Home		
oduct Search				
der History	Welcome to the Download	Central Homepage! Check out "My Recent Email Notifications" to view the latest		
earch Line Items	update notifications." My Recent Files Posted" displays any files posted in the past 30 days. "My Products" shows your list of products			
les Not Downloaded				
ecent Product Releases				
ecent Files Posted	Recent Email Notification	ons		
acent Email Notifications	View All			
SCORE Email Notifications	Mar 20, 2014	BizNet Software Order Notification		
ministration 🌣	Mar 17, 2014	BizNet Product Update Notification		
count Administrators	Mar 17, 2014	BizNet Product Update Notification		
count Members	Mar 17, 2014	Password Finder		
hange Password	Feb 27, 2014	Welcome to the BizNet Software Customer Portal		
nail Preferences				
roduct Preferences	Recent Files Posted			
ownload Preferences	View All			
ur Profile	Mar 17, 2014	BizBroadcast 2.1.1 - Release Notes		
	Mar 17, 2014	BizNet Broadcast 2.1.1 Documentation		
t Help 0	Mar 17, 2014	BizBroadcast 2.1.1		
ownload Help	Mar 17, 2014	BizInsight 5.0.34.4 Documentation		
ble of Contents	Mar 17, 2014	Bizinsight 5.0.34.4 Release Notes		
0.0	Mar 17, 2014	Bizinsight 5.0.34.4		
a.u				

Following are the files you will need to download:

BizInsight 5.5 SP3

BizContent - download all BizContent files to which you are entitled (required)

Step 2: Assign BizInsight Security to Users

Each BizInsight user's Windows account name must be added to a .users file in the admin shared directory in order for that user to perform any BizInsight action. You will use the License Administration Tool to perform these steps.

To assign BizInsight security to your users, do the following:

 On the server, double-click any content installer desktop icon. If the content installers were installed without desktop icons, browse to the installation directory and doubleclick the file named "BizNet Content Installer.exe". If the content installer was uninstalled, reinstall it.



If you do not want to reinstall the content installer, see "Manual Steps" on page 9.

2. Click on the **Admin Tool** button.

🖉 BizInsight Co	ntent Installer
	Relevant Information
Automatic Install	Reporting Server Found
Manual Install Stages	Reporting Server User Found
Install Report Server	Scripts Have Been Run
Create Report Server User	DataSet Content Found
Run Script Files	MetaData Content Found
	Section Content Found
	Users Have Been Added by Admin Tool
Deploy Data Set Content	Settings Have Been Configured by Config Tool
Deploy MetaData Content	
Deploy Function Content	
Admin Tool Config Tool	
Exit	5

3. Click on the ellipses and browse to the admin share folder of your BizInsight shared directory.

License Administration Tool - SERVER2008R2\linda	
Administration Path	-0
I Network share where your license file is stored.	

4. Select your BizInsight license file and click Open.



5. Click on the **Validate License** button to check how many licenses you currently have. Your current license count will be displayed.

License Administration Tool - SERVER2003\Administrator	
Administration Path	
C:\BizInsightShare\AdminShare\BizInsight.lic	
Network share where your license file is stored.	
Validate License	
BizNet Software Test License Expiration 01/31/2029	
Developer 1 Designer 2 Viewer 2 DrillDown 2	
	Exit

6. Click on the **Configure Users** button. The **Current Users** dialog will open.

License Administration Tool	- SERVER2008R2		<u> </u>
Administration Path	🖉 Current Users		
C:\BizInsightShare\Admin\BizInsi	User Type	Users	
Network share where your license	Designer 💌	domain∖linda	
1	Designer 💌	domain\albert	
Validate License	Viewer 💌	domain \marilyn	
BizNet Software Test License	Viewer 🗾	domain\frank	
Expiration 01/31/2029	•		
Developer 1 Designer 2			
Viewer 2			
DhilDown 2			
Configure Users			
	Add Row	Delete Row	Commit Changes

 You will now add your new BizInsight user and assign them a user type. Click on the User Type drop down and select the desired user type. If you want your user to be a Designer, choose Designer from the drop down list.

🕙 Current Users		
User Type	Users	
Designer 💌	domain∖linda	
Designer 💌	domain\albert	
Viewer 💌	domain \marilyn	
Viewer 💌	domain\frank	
•		
Designer Viewer DrillDown		

8. Type the user's name in the **Users** field in the format of domain\username.

WARNING Do **not** add your own login using the Admin Tool unless you know for sure that you have another login available with sysadmin rights to the SQL Server instance. Early versions of the content installer (pre version 1.6) will remove existing permissions for users, including those with sysadmin rights. Skip this step, if needed, to confirm sysadmin access will not be lost before proceeding.

🖉 Current Users			
User Type		Users	
Designer	•	domain∖linda	
Designer	•	domain\albert	
Viewer	Ŧ	domain\marilyn	
Viewer	•	domain\frank	
Viewer	•	domain\winston	
	•		

9. Click on the **Commit Changes** button when finished. You will be presented with a message asking if you want to grant the user additional security permissions. Click **Yes**.

Configuration Confirmation		X
Users must also be given additional folder permissions. Would you like to do this now?	permissions and Re	port Server
	Yes	No

If you have entered more names for a particular user type than you have licenses, you will get an error similar to the following.



You will be returned to the **Current Users** dialog where you can remove a row so that you comply with the number of licenses your company purchased. Select the row to remove and click the **Delete Row** button.

To purchase additional licenses, use the BizNet Assistant button to open a support ticket indicating that you need to purchase additional licenses.



When you receive your new license, move your old license from the Administration Path shared directory and save the new license there. Do not rename the old license and leave it in the Administration Path; it must be removed from the directory in order for the new license count to take effect.

Manual Steps

1. In the Admin shared directory, open the .users file with Notepad that corresponds with the BizInsight permissions the user should have. For example, if the user should have Designer permissions, you would open the Designer.users file.

Tip If you are not sure where to find the Admin shared directory, go to an existing user's workstation, open Excel and click on the **Application Settings** button on the BizInsight ribbon and copy the path provided for the Administration Path.

2. In the .users file, add the Windows account name of the BizInsight user. For more information on the different user types, refer to the User Types section of the User Guide.



3. Save and close the file.

IMPORTANT As you add Windows account names to the .users files, add only as many as you have licenses. If you add more Windows account names than you have licenses or you have an extra line return in the file, users will get an error message similar to the following when they open Excel after BizInsight is installed.



If you are not sure how many licenses you have, open the .lic file that is in the Admin

shared directory with Notepad and check how many licenses are shown for the user type you are adding.

To purchase additional licenses, use the BizNet Assistant button to open a support ticket indicating that you need to purchase additional licenses.



When you receive your new license, move your old license from the Administration Path shared directory and save the new license there. Do not rename the old license and leave it in the Administration Path; it must be removed from the directory in order for the new license count to take effect.

Step 3: Assign rights in SQL Server Security

BizInsight users will need permissions to retrieve data from the accounting system database or if the content pack is designed to retrieve data using a SQL linked server, the users will need rights to the master database in SQL Server.

NOTE If you are managing SQL Server security with an Active Directory group, just add the new BizInsight user to that Active Directory group and go to the next step.

1. Click on Start >Programs > Microsoft SQL Server Version > SQL Server Management Studio.



2. The **Connect to Server** dialog will open. Connect to the SQL Server instance that hosts your accounting system database.

Microsoft*	≤ Server 2008 R2		
Server type:	Database Engine		
Server name:	server2008r2\BizNet		
Authentication:	Windows Authentication		
User name:	SERVER2008R2\linda		
Password:			
	Remember password		
Connec	t Cancel Help Options >>		

3. In the left pane, expand **Security.** Look for your existing users to determine whether they have been setup to use their Windows domain account or a SQL Server account. You can tell one from the other by the presence of the domain in front of the user name.



NOTE If the user's login already exists in SQL Server, right-click their login id and choose Properties. Then click <u>here</u> to jump to the User Mapping step.

4. Right-click on Logins and click **New Login**.



5. In the Login – New dialog box, enter the user's name in the **Login name** field. If your existing users were setup with their Windows logins, click on **Search** to browse for an existing Windows login id. If your existing users were setup with a SQL account, type the new user's login id and change the radio button to SQL Server authentication.

🚪 Login - New				
Select a page	🔄 Script 👻 📑 Help			
Server Roles	Login <u>n</u> ame:	YourDomain\Idavis		S <u>e</u> arch
Securables	Mindows authentication			
😭 Status	O <u>SQL</u> Server authentication			
	<u>P</u> assword:			_
	Confirm password:			-
	Specify old password	,		
	Old password:			-
	Enforce password polic	U		
	Enforce password expir	ation		
	☑ <u>U</u> ser must change pass	word at next login		
	 Mapped to certificate 			2
	Mapped to asymmetric key			-
	Map to Credential			Add
Connection	Mapped Credentials	Credential	Provider	- <u> </u>
Server:				-
Server2003				
Connection: SERVER2003\Administrator				
June 2010 Street				
Progress				Remo <u>v</u> e
Ready	Default <u>d</u> atabase:	master		-
Traps'	Default language:	<default></default>		·
·				
			OK	Cancel

6. Click on **User Mapping** in the left pane. Check the **Map** checkbox next to the accounting system database.

🚪 Login - New					
Select a page	🔄 Script 👻	📑 Help			
Server Roles	Users map	ope <u>d</u> to this login:			
	Мар	Database	User	Default Schema	▲
📑 Status		001			
		AccPac			
		amwsys			
		BizInsight			
		BizInsightDB			
		BizNetERP			
		ССН			
		Company01			
		Company11			
		CPU			-
Kun	🗖 Guest	account enabled for: BizNe			

If your content pack uses linked servers (Sage 100, QAD SE or EE, etc.), click the checkbox next to the master database.

📕 Login - New				
Select a page	<u> S</u> Script 👻	[Help		
Server Holes	Users map	ppe <u>d</u> to this login:		
	Мар	Database	User	Default Schema 🔺
🚰 Status		MAS_ABX		
		MAS_BizNetMR		
		MAS_MFG		
		MAS_SYSTEM		
		mas500_app		
		master		
		model		
		msdb		
		ReportServer		
		ReportServer_Epicor		-
h/				

7. Once the database is checked in the upper pane, check the **db_datareade**r role membership in the bottom pane. Click **OK**.

	Database <u>r</u> ole membership for: master
Connection	db_accessadmin
Server:	db_backupoperator
Server2003	✓ db_datareader
Connection: SERVER2003\Administrator	db_datawriter
View connection properties	db_denydatawriter db_owner
Prograa	db_securityadmin
Flogress	
Ready	
	OK Cancel

8. If the accounting system stores company data in separate databases, repeat the steps of checking the database and the db_datareader role for each company database.

Step 4: Assign rights in Reporting Services

This step probably has been addressed by the Content Installer Admin tool. In the event an error occurred while users were being assigned security rights or you did not use the Admin Tool to assign BizInsight security to the new user, follow these steps to assign them rights to the Reporting Services items.

NOTE If you are managing Reporting Services security with an Active Directory group, make sure the user is a member of that group and that group has been added to Reporting Services security.

All BizInsight users must have rights granted to them in Reporting Services. Reporting Services uses role-based security to secure access to items managed by the report server.

IMPORTANT Starting with the BizInsight build 5.0.34, the minimum pre-defined role necessary for a BizInsight user is Content Manager. A script is provided in the document titled "*Installing SQL Server and Reporting Services*" to create a custom role named "BizNetUser" that will assign only the minimum permissions required for the XMLFast feature.

2	SQL Server Reporting S New Role Assigni	Services ment	<u>Home</u>	<u>My Subscriptions</u> <u>Site Sett</u> Search for:
Use this	s page to define role-bas	ed security for Home.		
Group o	r user name:			
Select o	one or more roles to assig	gn to the group or user.		
🗖 Rol	le↓	Description		
Bro	wser_	May view folders, reports and subscribe to reports.		
	ntent Manager	May manage content in the Report Server. This includes folders, reports	s and re	esources.
🗆 Му	Reports	May publish reports and linked reports; manage folders, reports and reso	urces i	n a users My Reports folder.
D Put	<u>blisher</u>	May publish reports and linked reports to the Report Server.		
🗆 Rep	port Builder	May view report definitions.		
ОК	Cancel New Role			

Reporting Services Security is accessed by browsing to the Reporting Services Report Manager URL (ex. http://servername/reports). Go to the Application Settings dialog of your currently working BizInsight user and copy the Reporting Services URL that is listed in the dialog. Modify the "reportserver" part of the URL to "reports" then paste into a browser.

IMPORTANT If Reporting Services is installed on a *Windows Server 2008 or higher* server and User Account Control ("UAC") is enabled, you must elevate your privileges when you start Internet Explorer. To do this, press **CTRL+Shift** and then right-click on Reporting Services Configuration Manager and select **Run as administrator**.

For SQL Server Reporting Services 2005 and 2008, go to the **Properties** tab:

R	SQL Server Reporting Service	25	
Contents	Properties		
道 New F	Folder 🛯 🎨 New Data Source	🚽 Upload File	🔝 Report Builder

For SQL Server Reporting Services 2008 R2, click on the **Folder Settings** button.

SQL Server Reporting Services Home	
🚞 New Folder 🕴 🤽 New Data Source 🕴 🕌	Report Builder 🛛 🖾 Folder Settings 🖵 🎕 Upload File

The following screenshot shows an example of a Reporting Service site with user security configured. The user named "linda" has been given Content Manager permissions.

🧀 - Report Manager - Windows Internet Explorer				
🕞 💿 🗢 🙋 http://server	2003/Reports/Pages/Folder.aspx?ItemPath=/&Selected	TabId=PropertiesTab		
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites	Tools Help			
🖕 Favorites 🛛 👍 🙋 Sugges	ted Sites 🝷 🙋 Free Hotmail 🧧 Web Slice Gallery 🝷			
A Report Manager				
SQL Server Rep	orting Services			
Home	-			
Tionic				
	🗙 Delete 🕴 🏄 New Role Assignment			
Security	Group or User 🗸	Role(s)		
	Edit BUILTIN\Administrators	Content Manager		
	Edit SERVER2003\Administrator	Content Manager		
	Edit SERVER2003\aeinstein	Content Manager		
	Edit SERVER2003\cclay	Content Manager		
	Edit SERVER2003\epicuser	Content Manager		
	Edit SERVER2003\epresley Content Manager			
	Edit SERVER2003\fsinatra	Content Manager		
	Edit SERVER2003\Idavis	Content Manager		
	Edit SERVER2003\linda	Content Manager		
VOTADNARKA	Edit SERVER2003\lolivier	Content Manager		
	Edit SERVER2003\mmonroe	Content Manager		
	—	-		

Step 5: Add User to Security Table

If you have configured BizInsight's caching service to restrict users from accessing data, you will need to add the user to the security table in EAS to grant them rights to the companies to which they should have access.

If you are not sure if you are using this capability, go to the server where the caching service is installed and browse to its installation directory. If it was installed to the default path, that directory is C:\Program Files\BizNet Software\BizNet Service or C:\Program Files (x86)\BizNet Software\BizNet Service if the server is 32-bit.

Open the file named "BizNetWCFServiceHost.exe.config" with Notepad and locate the SecureMode setting. If it is set to True, security is enabled and all new users must be granted rights to the companies from which they should be able to retrieve data.

Use the following script to insert new records into the CRYSTAL_USER_COMPANY table in the EAS database. Adjust the script to provide the EAS database name, the user's Windows login id for the *userid* value and the company code to which they should be given access.

```
INSERT INTO [EAS_Database_Name].[dbo].[CRYSTAL_USER_COMPANY]
([USER_ID], [COMPANY_CODE])
VALUES
('userid','companycode')
GO
```

Step 6: Install BizInsight

IMPORTANT If you are using BizInsight in a Terminal Services/Citrix environment, do not perform the following installation steps because BizInsight is already installed on the server. Instead, log onto the Terminal Services/Citrix server as the new user, browse to the reg5 subdirectory of the BizInsight installation folder and double-click the file named "**Register BizInsight for Excel xxxx OnDemand.bat**". Move to the next step, "Configure BizInsight".

- 1. Locate the BizInsight product installation files that you downloaded from the portal site and extract the contents.
- 2. Extract the .zip contents to any directory that is accessible from the client workstation.
- 3. Double-click the **Setup.exe** for the Excel version that is installed on the client workstation.
- 4. The installation will check to see if Microsoft .Net Framework 4.0 is installed. If not installed, the following dialog will display. Click **Accept**.

💑 i man 🕂 Camara Setup	×
For the following components:	
Microsoft .NET Framework 4 (x86 and x64)	
Please read the following license agreement. Press the page down see the rest of the agreement.	n key to
	1
MICROSOFT SOFTWARE SUPPLEMENTAL LICENSE TERMS	S
MICROSOFT .NET FRAMEWORK 4 FOR MICROSOFT WINDOWS OPERATING	-
View EULA for printing	
Do you accept the terms of the pending License Agree	ment?
If you choose Don't Accept, install will close. To install you must a this agreement.	ccept

5. The installation will then check to see if the Microsoft Office Primary Interop assemblies for the installed Excel version are installed as well as a specific Microsoft Update that is necessary for proper Excel add-in functionality. If not found, the following dialog will display. Click **Install**.



6. The splash dialog will open. Click **Next** to continue.



7. The Welcome dialog will open. Click **Next** to continue.



8. The **License Agreement** dialog will open. Read through the agreement and if you agree with the terms, click the **I agree** radio button and then click **Next**.

End-User License Agreement	
Please read the following license agreement carefully	BizNetsoftware
	<u></u>
End User License Agre	eement
NOTICE TO ALL USERS: PLEASE READ	THIS AGREEMENT
CAREFULLY. BY CLICKING THE "I AG	REE" BUTTON AT
THE BOTTOM OF THIS PAGE OR BY I	INSTALLING AND
USING THE SOFTWARE, YOU AGREE TO	O ACCEPT ALL OF
AND YOU AGREE THAT THIS	AGREEMENT IS
ENEODCEADIE AS IE IT DAD DEEN SI	CNED DV VOIL IE
✓ Laccept the terms in the License Agreement	
Print Back	Next Cancel
Duck	

9. Accept the default installation directory or browse to a location of your choice. Click **Next**.



10. Click Next at the Confirm Installation dialog.

🙀 BizInsight			
Confirm Installation			
			✓BizInsight [*]
The installer is ready to install BizInsight o	on your computer.		
Click "Next" to start the installation.			
	Cancel	< Back	Next>

11. The Enter your Configuration Path dialog will open. If you have an app.config file produced by a Content Installer in your Configuration Path, leave the default option. Click **OK**.



If you do not have a Content Installer created app.config file, choose the **User Managed** radio button to proceed. You will need to supply the key paths when configuring BizInsight for the user. When you click OK, the Import Settings Skipped dialog will open. Click **OK**.



12. If the Centrally Managed option was selected, click the Browse button and browse to the Configuration Path shared directory.

🐼 Enter your Configuration Path	x
Please provide the shared directory path to the configuration file. Configuration Path	
\\ servername \ConfigurationPath	
Check below if you would like to remove the existing settings and take the settings from the configuration path.	
☑ Take settings from the configuration path	
Import Settings Skip	

Click Import Settings.

13. Once the installation completes, click **Close**.

🚏 BizInsight				
Installation Complete				✓BizInsight ⁻
BizInsight has been successfully installed	ł.			
Click "Close" to exit.				
Please use Windows Update to check for	or any critical up	dates to the .	NET Framev	vork.
	Cancel	<	Back	Close

Installing BizInsight for the Non-Administrative User

If you have installed BizInsight while logged in as a different login than the BizInsight end user, you will need to perform the following additional steps in order to get BizInsight functioning for this user.

- 1. After completing all of the preceding steps to install BizInsight, log out of the client workstation and log back in as the BizInsight user.
- 2. Open Windows Explorer and browse to the reg5 subdirectory of the BizInsight local directory.
- 3. Double-click the file named "**Register BizInsight for Excel xxxx OnDemand.bat**", where "xxxx" is the Excel version (2003, 2007, 2010 or 2013).
- 4. If the workstation is running Windows 7 with User Account Control ("UAC") enabled, click Yes to all UAC pop-ups. Click Yes or OK to all dialogs that open.

Registry	y Editor
Â	Adding information can unintentionally change or delete values and cause components to stop working correctly. If you do not trust the source of this information in Excel2007_register_OnDemand.reg, do not add it to the registry. Are you sure you want to continue?
	Yes No
RegSvr	32
1	DllRegisterServer in\bin5\adxloader.dll succeeded.

IMPORTANT If you get the following error when running the .bat file, you must edit the file named "Register BizInsight for Excel xxxx OnDemand.bat" to add the file directory path to each regedit.exe line.



To edit the "Register BizInsight for Excel xxxx OnDemand.bat", open it with Notepad and add the file directory path to each regedit.exe entry in the file. For example:

Register BizInsight for Excel 2013 OnDemand.bat - Notepad	_ 🗆 🗙
File Edit Format View Help	
regedit.exe C:\BizInsight\Excel2013_UNregister.reg del %userprofile%\AppData\Local\Microsoft\Office\Excel15.CUSTOMUI del %userprofile%\Local Settings\Application Data\Microsoft\Office\Excel15.CU \bin5\adxregistrator.exe /uninstall="BizInsightxL.dll" /privileges=user \bin5\adxregistrator.exe /install="BizInsightxL.dll" /privileges=user regedit.exe C:\BizInsight\Excel2013_register_OnDemand.reg	JSTOMUI

5. When the .bat file completes, start Excel and continue with the next steps.

Step 7: Configure BizInsight

1. If you used the Content Installer to create an app.config file to use for Centrally Managed settings, you can skip this step.

You will need to know the paths for the BizInsight implementation. Go to the server and start the Content Installer. Click on the Relevant Information link and make a note of the values shown.



🖉 Relevant Information	
Config Path:	\\SERVER2008R2\ConfigurationPath
	C:\BizInsightShare\Config
Admin Path:	\\SERVER2008R2\AdministrationPath
	C:\BizInsightShare\Admin
Report Server Url:	http://SERVER2008R2/Report Server
Report Folder	<u>BizNetERP</u>
Sql Server MetaData Database and Instance Name:	SERVER2008R2
Packaged with Content Packager Versi	on 1.4.1.0
Close	Copy to Clipboard

If you cannot find the Content Installer on the server, you can get the necessary information from an existing BizInsight workstation, if one exists. Open Excel on a workstation where BizInsight is installed, click on the **Application Settings** button on the BizInsight ribbon and copy the values provided for the **Configuration Path**, the **Administration Path**, the **Default Reporting Services Server** and the **Default Reporting Services Folder Name** fields.

Application Settings	
Use settings from Configuration Path.	
- BizInsight Settings	
Configuration Path Configure SQL	
\\SER\/ER2009R2\ConfigurationRath	
Folder or network share where the BizInsight.biz a	nd BizInsightDB.biz are stored.
Administration Path	
\\SERVER2008R2\AdministrationPath	
Network share where your license file and user file:	s are stored .
Options	
Enable Formula Editor Pop-up	Persist SQL Authentication
	Clear Credentials
I Enable Cache Information Dialog	Local Content Path
Enable XMLFAST	Local Content I ath
Enable Startup Messages	Calculation Settings
Use Advanced Expression Editor	Account Definitions
Reporting Services Default Settings	
Default Reporting Services Server	
http://SERVER2008R2/ReportServer	
Format: "http://server/reportserver"	
Default Reporting Services Folder Name	
SunGard Analysis	
Full name of the folder on the reporting services se	erver where the RDLs are deployed.
	ОК

Click on the **Configure SQL** button to see if the client workstation is configured for SQL

metadata databases. If this dialog is configured, make a note of the values.

🔀 SQL Server MetaData Connection	×
Use SQL Server for MetaData	
Use SQL Authentication	
Username	
Password	
Database server and instance	
server2003\biznet	
SQL connection information for BizInsight databases Database instance name not required if using default	
OK]

2. While logged in as the BizInsight end user, open Excel.

The next steps depend on whether you chose the Centrally Managed option at the end of the BizInsight installation or chose to manage your settings at the user level. Click <u>here</u> to jump to the Centrally Managed steps.

User Managed Settings Steps (blue background)

3. If you receive the following dialog, click **Skip**.

3	Enter your Configuration Path	
	Please provide the shared directory path to the configuration file. Configuration Path	
	Check below if you would like to remove the existing settings and	
	Take settings from the configuration path	
	Import Settings Skip	

Click **OK** to the next message regarding the use of default settings.

Import Settings Skipped	x
The current settings are set to default. You can change the settings in the application settings dialog.	1
ОК	

If you receive the following error, go back to the server and grant the user BizInsight security rights, see "Assign BizInsight Security to Users" on page 80.



4. The Application Settings dialog will open. If it does not open, click on the Application Settings button on the BizInsight ribbon.



Perform the following steps:

a. Provide Essential Paths

You must provide values for the **Configuration Path**, the **Administration Path**, the **Default Reporting Services Server** and the **Default Reporting Services Folder Name** fields.

Application Settings
Use settings from Configuration Path.
BizInsight Settings
Configuration Path Configure SQL
C:\BizInsight
Folder or network share where the BizInsight biz and BizInsightDB.biz are stored.
Administration Path
Network share where your license file and user files are stored.
Options
Enable Formula Editor Pop-up
Enable Refresh Timer Clear Credentials
Enable Cache Information Dialog Local Content Path
Calculation Settings
Use Advanced Expression Editor Account Definitions
Reporting Services Default Settings
Default Reporting Services Server
http://servemame/reportserver
Format: "http://server/reportserver"
Default Reporting Services Folder Name
Folder Name Full name of the folder on the reporting services server where the RDLs are deployed.
ок

You should have looked up these values at the start of this section.
b. *SQL Credentials Steps* (skip if not using SQL credentials for data retrieval from the Accounting database)

If you configured the Reporting Services data source to use SQL credentials during content deployment, check the **Persist SQL Authentication** checkbox.

Note This step only applies to the Analysis Sets feature.

Application Settings	<u>- ×</u>
BizInsight Settings	
Configuration Path Configure SQL	
\\servername\BizInsightShare\ConfigurationPath	
Folder or network share where the BizInsight.biz and BizInsightDB.biz are stored.	
Administration Path	
\\servername\BizInsightShare\AdministrationPath	
Network share where your license file and user files are stored.	
Options	
Enable Formula Editor Pop-up	Dnly)
Enable Refresh Timer Enable Startup Messages	
Enable Cache Information Dialog Clear Credentials	

c. Click on the Local Content button. If the default path displayed is not a local directory, click on the Override checkbox and change the path to a directory that resides on the local computer, C:\BizInsight is suggested.

x
ОК
×
 OK

d. SQL MetaData Databases

If the BizInsight SQL metadata databases (BizInsight and BizInsightDB) were implemented during the server setup, click on the **Configure SQL** button. If the **Application Settings** dialog does not have this button, BizInsight is not the right version. You need to uninstall and install the most current BizInsight version.

BizInsight Settings Configuration Path Configure SQL Folder or network share where the BizInsight.biz and BizInsightDB.biz are stored.	
Configuration Path Configure SQL Folder or network share where the BizInsight.biz and BizInsightDB.biz are stored.	_
Folder or network share where the BizInsight.biz and BizInsightDB.biz are stored.	
Folder or network share where the BizInsight.biz and BizInsightDB.biz are stored.	
Administration Path	

 Check the Use SQL Server for MetaData checkbox and enter the SQL Server name, and instance name if applicable, where the BizInsight SQL databases (BizInsight and BizInsightDB) are located. The format should be servername\instancename.

SQL Server MetaData Connection
✓ Use SQL Server for MetaData
Use SQL Authentication
Username
Password
Database server and instance
SERVER2003\BIZNET
SQL connection information for BizInsight databases Database instance name not required if using default
Use custom MetaData databases
BizInsight Databases
BizInsight Menu DB BizInsight
BizInsight Data DB BizInsightDB
Test Connection OK

NOTE The **Use custom MetaData databases** option will only be used in situations where BizInsight is installed in a hosted environment and is shared by multiple customers.

ii. If users will be connecting to the SQL metadata databases using SQL authentication, check the Use SQL Authentication checkbox. You will get the following Warning message indicating that the credentials provided will be stored in clear text in a configuration file in the user's profile.



Click **OK** and enter a valid SQL login and password with appropriate rights to the SQL MetaData databases. Click **OK**.

2 S	QL Server MetaData Connection	X
1	Use SQL Server for MetaData	
	Use SQL Authentication	
	Username bizuser	
	Password *****	
0	Database server and instance	
[omi.om(2003)	
	SQL connection information for BizInsight databases Database instance name not required if using default	
	ОК	

IMPORTANT This dialog allows you to use a different method of connectivity to the BizInsight MetaData databases than for the accounting system database.

- e. Close the Application Settings dialog.
- 5. Re-start Excel.

6. Click on the BizInsight tab and then click on the BizInsight Explorer button to load the Navigation Pane.

	File	Home	Insert	Page La	yout	Formulas	Data	Revie	w	View	BizInsight	٦
ſ				Σ	$\boldsymbol{\times}$		\mathbb{Q}	ţî)	SQL	! ?		
I	BizInsight Explorer	Application Settings	Data Caches	Expression Editor	Offline	Save Changes to BizInsight	Scan for Content	ByPass Cache	Show SQL	BizNet Assistant	About	
ļ				BizIns	ight Rep	porting and An	alytics					

7. Skip to the next white background step.

Centrally Managed User Settings (green background)

8. If you are using Centrally Managed settings, you will see Scan for Content run when you first open Excel. Click **OK** and restart Excel.

💷 C:\BizInsight\b	in5\ScanForContent.exe	×
	ScanForContent	×
	Scan for Content has completed. Please restart Excel and continue your work.	
•	OK	

9. You should see the Navigation Pane display on the left side in Excel.



10. If you receive the following error, go back to your server and make sure all of the configuration changes have been made for XMLFast (see "CheckTCP/IP, SQL Browser and Firewall Exceptions" on page 54) and make sure the end user has the db_datareader and db_datawriter permissions to the SQL metadata databases (BizInsight and BizInsightDB).



Click **OK** to this message as well as the one that follows:



If you receive the following error, go back to the server and grant the user BizInsight security rights, see "Assign BizInsight Security to Users" on page 80.

Access Der	ied	×
8	The user PC\Dan is authorized with No access rights. Please o license and users file.	:heck your
	[ОК

You are now ready to test the installation. Proceed to "Verify the BizInsight Installation".

Step 8: Verify the BizInsight Installation

Locate an existing BizInsight report to use to verify the installation. Open the report, right-click anywhere in the report and choose **BizNet Refresh**.



If you receive an error, click on the BizNet Assistant button on the BizInsight ribbon, choose the **Resolve Issues automatically** option and click **Next**. Once that process finishes, refresh the report again to see if the issue is resolved.

If the issue is still not resolved, you can contact BizNet Software Support using the BizNet Assistant's **Contact Support** option. If it is after hours or you want to continue to try to troubleshoot, you can get to the BizNet knowledge base by choosing the **Online documentation** option in BizNet Assistant. Once at the online documentation site, click on the link to the BizNet knowledge base.



Appendices

Manually Installing BizContent Add-ins	.43
CheckTCP/IP, SQL Browser and Firewall Exceptions	.54
Assign BizInsight Security to Users	.80

Manually Installing BizContent Add-ins

If you are using a BizInsight version that is older than 5.5 SP1, you will need to register the BizContent add-ins manually in Excel. BizNet Software recommends upgrading to the latest BizInsight version but if that is not possible, perform the following steps:

1. Browse to the BizInsight shared directory and copy the content add-in files (.dll, .xll and .dna) to the directory to which you installed the BizInsight client. If you are using separate config and admin folders, the client add-in files will be in the config folder.



The remaining steps vary based on the Office version installed:

Office 2010/2013 steps Excel 2007 steps Excel 2003 steps

Excel 2010/2013

1. Click on File > Options.

X 🖉 4) = (4 = ;	-
File Home	Insert
🛃 Save	
Save As	
🚰 Open	
Close	
Info	
Recent	
New	
Print	
Save & Send	
Help	
Dptions 🞝	
🔀 Exit	

7. Click on **Add-ins** in the left pane and then click on **Go** at the bottom on the right pane.



2. In the Add-ins dialog, click on the **Browse** button.



3. Browse to the directory to which you installed BizInsight and select the .xll file in that directory. Then click **OK**.



The Add-ins dialog should now look like the following:

Add-Ins		? ×
Add-Ins available:		
Analysis ToolPak	A	OK
 BizInsightXL.Foundation BizNetERP 		Cancel
Euro Currency Tools		Browse
		Automation
BizInsightXL.Foundation ProgID: BizInsight	xL.Four	idation

4. Click **OK**.

Excel 2007

1. Click on the **Office** button and then click on the **Excel Options** button.



2. Click on **Add-ins** in the left pane and then click on **Go** at the bottom on the right pane.

ave	Name -	Location	Туре
D.GUIDON	Active Application Add-ins		
inguage	BizInsight	C:\BizInsight\bin5\adxloader.dll	COM Add-in
dvanced	BizInsightXLFoundation	C:\Windows\SysWOW64\mscoree.dll	Excel Add-in
ustomize Ribbon	Inactive Application Add-ins		
	Analysis ToolPak	C:\ice\Office14\Library\Analysis\ANALYS32.XLL	Excel Add-in
uick Access Toolbar	Analysis ToolPak - VBA	C:\Office14\Library\Analysis\ATPVBAEN.XLAM	Excel Add-in
	Custom XML Data	C:\6)\Microsoft Office\Office14\OFFRHD.DLL	Document Inspector
dd-Ins	Date (XML)	C:\les\microsoft shared\Smart Tag\MOFL.DLL	Action
	Euro Currency Tools	C:\t Office\Office14\Library\EUROTOOL.XLAM	Excel Add-in
ust Center	Financial Symbol (XML)	C:\les\microsoft shared\Smart Tag\MOFL.DLL	Action
	Headers and Footers	C:\6)\Microsoft Office\Office14\OFFRHD.DLL	Document Inspector
	Hidden Rows and Columns	C:\6)\Microsoft Office\Office14\OFFRHD.DLL	Document Inspector
	Hidden Worksheets	C:\6)\Microsoft Office\Office14\OFFRHD.DLL	Document Inspector
	Invisible Content	C:\6)\Microsoft Office\Office14\OFFRHD.DLL	Document Inspector
	Microsoft Actions Pane 3		XML Expansion Pack
	Solver Add-In	C:\Ce\Office14\Library\SOLVER\SOLVER.XLAM	Excel Add-In
	Document Related Add-ins		
	No Document Related Add-ins		
	Disabled Application Add-ins		
	No Disabled Application Add-ins		
	Add-in: BizInsight		
	Publisher: <none></none>		
	Compatibility: No compatibility inform	mation available	
	Location: C:\BizInsight\bin5\adx	loader.dll	
	Description: AddinModule		

3. In the Add-ins dialog, click on the **Browse** button.



4. Browse to the directory to which you installed BizInsight and select the .xll file in that directory. Then click **OK**.



The Add-ins dialog should now look like the following:

Add-Ins		? ×
Add-Ins available:		
Analysis ToolPak	A	OK
BizInsightXL.Foundation		Cancel
Euro Currency Tools		Browse
		Automation
BizInsightXL.Foundation ProgID: BizInsight)	XL.Four	idation

5. Click **OK**.

Excel 2003

1. Click on Tools > Add-Ins



2. In the Add-ins dialog, click on the **Browse** button.



3. Browse to the directory to which you installed BizInsight and select the .xll file in that directory. Then click **OK**.



The Add-ins dialog should now look like the following:

Add-Ins		? ×
Add-Ins available:		
Analysis ToolPak	A	OK
 BizInsightXL.Foundation BizNetERP 		Cancel
Euro Currency Tools		Browse
		Automation
BizInsightXL.Foundation ProgID: BizInsight	xL.Four	idation

4. Click **OK**.

CheckTCP/IP, SQL Browser and Firewall Exceptions

The XMLFast feature added in an earlier BizInsight build requires the following server configuration changes:

- The TCP/IP protocol must be enabled for SQL Server and the SQL Browser Service must be running. see "Enable TCP/IP" below.
- Server firewall exceptions must be added for TCP Port 1433, UDP Port 1434 and a program exception for sqlservr.exe. see "Add Windows Firewall Exceptions" on page 64

Customers are strongly encouraged to make these changes in order for the XMLFast feature to work. While the XMLFast feature can be turned off on the client workstation in Application Settings, doing so will result in significantly slower data retrieval times.

Enable TCP/IP

To enable TCP/IP, the steps vary depending on your SQL Server version. The steps for SQL Server 2005 are as follows. For SQL Server 2008 or higher, see "SQL Server 2008" on page 59.

SQL Server 2005

1. Click on Start > All Programs > Microsoft SQL Server 2005 > Configuration Tools > SQL Server Surface Area Configuration.



2. Click on Surface Area Configuration for Services and Connections.



3. In the left pane, click on **SQL Server Browser**. When the right pane has refreshed with the options for the SQL Server Browser, make sure that **Startup Type** is set to "Automatic" and click on **Start** if the service is not started.

🐐 Surface Area Configuration for S	ervices and C	onnections - localhost 🛛 🔀		
SQL Server 2005 Surfa	ce Area Co er	nfiguration		
Enable only the services and connection protect your server by reducing the surfac Seject a component and then configure its	types used by y e area. For defa services and cor	our applications. Disabling unused services and connections hebs ult settings, see <u>Help</u> . nnections:		
SQLEXPRESS Jordan Service Service	This service ret this service is re	urns named pipe and TCP port information to client applications. Enabling ecommended for Analysis Services.		
SQL Server Browser	S <u>e</u> rvice name:	SQLBrowser		
✦ Service	<u>D</u> isplay name:	SQL Server Browser		
	Des <u>c</u> ription:	Provides SQL Server connection information to client computers.		
	Startup type:	Automatic		
	Service status:	Running		
	<u>S</u> tart	Stop Pause Resume		
View by Instance View by Component				
		OK Cancel <u>Apply</u> <u>H</u> elp		

4. Under Database Engine, click on **Remote Connections**. Select the **Local and Remote Connections** radio button to enable remote users to access this SQL Server instance. Click **Apply**.

🐐 Surface Area Configuration for S	ervices and Connections - localhost	×		
SQL Server 2005 Surface Area Configuration Help Protect Your SQL Server				
Enable only the services and connection protect your server by reducing the surfar Seject a component and then configure its	types used by your applications. Disabling unused services and connections helps ce area. For default settings, see <u>Help</u> . s services and connections:			
 □ □ SQLEXPRESS □ □ Database Engine Service → Remote Connections ■ □ SQL Server Browser 	By default, SQL Server 2005 Express, Evaluation, and Developer editions allow local client connections only. Enterprise, Standard, and Workgroup editions also listen for remote client connections over TCP/IP. Use the options below to change the protocols on which SQL Server listens for incoming client connections. TCP/IP is preferred over named pipes because it requires fewer ports to be opened across the firewall.	:		
	Local connections			
	Using ICP/IP only			
	O Using named pipes only			
	 Using both TCP/IP and named pipes 			
View by Instance View by Component		_		
	OK Cancel Apply Help			

5. An alert dialog will be displayed indicating that the changes will not take effect until the Database Engine service is stopped and restarted. Click **OK**.

Connect	tion Settings Change Alert	×
į	Changes to Connection Settings will not take effect until you restart the Database Engine service.	
E)	OK.]

6. In the left pane, expand **Database Engine** and click on **Service**. In the right pane, click on **Stop** and then click on **Start** when that button becomes enabled. Once the service is restarted, click **OK** to exit the Surface Area Configuration tool.

🐐 Surface Area Configuration for S	ervices and C	Connections - localhost 🛛 🔀
SQL Server 2005 Surfa Help Protect Your SQL Server	ce Area Co er	onfiguration
Enable only the services and connection protect your server by reducing the surfac Select a component and then configure its	types used by y e area. For defa services and cor	our applications. Disabling unused services and connections hebs ult settings, see <u>Help</u> . nnections:
 ■ SQLEXPRESS ■ Database Engine → Service Remote Connections ■ Q SQL Server Browser Service 	Disable this ser Service name: Display name: Description: Startup type: Service status:	vice unless your applications use it. MSSQL\$SQLEXPRESS SQL Server (SQLEXPRESS) Provides storage, processing and controlled access of data and rapid Automatic Running Stop Pause
View by Instance View by Component		
		OK Cancel <u>Apply H</u> elp

SQL Server 2008

1. Click on Start > All Programs > Microsoft SQL Server 2008 (2008 R2) > Configuration Tools > SQL Server Configuration Manager.

ł	.ontent	Ar Content i	2	Microsoft SOL Service 2009 D2		0	Applusie Coursing				
	I			Microsoft Viewal Studio 2008	÷		Configuration Tools		63	Reporting Services Configuration Manager	
j			-	Startun	ĺ.		Integration Services			SOL Server Configuration Manager	
	Ad	ministrate	-	Windows DowerShell 1.0	í.	-	Performance Tools		1	SQL Server Error and Licage Reporting	2
ł				Verdows Fowershell 1.0	ſ		Impart and Expart Data (22 bit)		-	SQL Server Error and Usage Reporting	
		Manage Your	-	Orderal Survey			COL Course Duringers Tabalitaness Davidserset Church	т		SQL Server Installation Center	_
	~		-	Outlook Express		9	SQL Server Business Intelligence Development Studio				
	01	Windows Expl	2	Remote Assistance		32	SQL Server Management Studio				
	_			Administrative Loois	1						
	X	Microsoft Offi		Microsoft SQL Server 2005	•						
		2007		Microsoft Visual Studio 2005	•						
		SOL Server Pi		Sage Software	•						
			0	7-Zip	•						
		SOL Service Mar	Å	Adobe Reader X							
		 Studio 	6	Pervasive	•						
	m		6	Microsoft Office	•						
		Notepad	6	Notepad++	۲						
	-		6	BizNet Software	۲						
	1 III	SQL Server Con Manager	-	BizNet License Administration Tool							
				Sage PFW							
		SQL Server Bus	m	Sage PFW	•						
	- 10	j incomponico por	6	Epicor XL Connect	•						
	CX.	Content Packag	6	Epicor XL Connect 9.05 SP1 for Enterprise AM Content Pack							
	_		ē	XL Connect EPIC905GL 1.0.11.0 Content Installer							
	9	SQL Server Surl	6	BizInsight DYSLGL 1.0.2.0 Content Installer	,						
	1.	Configuration	ē	BizInsight BizNetERP GL 1.0.0.0 Content Installer							
		All Programs	0	Content Architect	,						
ł			1	Content Architect SDK							
			2	Content Packager							
ł	+ Cha		-	VI Connect Enir@0P.1.0.4.0. Content Installer	í.						
1	- Sta	···] 🐸 🖉	1	Ac connect cpream more content installer	1						

2. Expand **SQL Server Network Configuration** and select the **Protocols for** *InstanceName* that corresponds to the SQL Server instance that hosts the accounting system database.



3. Verify that the **TCP/IP** Protocol is "Enabled". If it is not enabled, double-click on the protocol and change its properties to enabled. You will receive a warning that the service will need to be stopped and restarted:



4. Go to the **SQL Server Services** section. Select the SQL Server service and click on the restart the service button.

🙀 SQL Server Configuration Manager		_ 🗆 ×
File Action View Help		
🗢 🔿 🖄 🖻 🗟 🛛 🕖 👰		
SQL Server Configuration Manager (Local)	tart service	State
SQL Server 2005 Services	TO SQL Server FullText Search (SQL 2005)	Stopped
🖃 🚊 SQL Server 2005 Network Configuration	SQL Server (SQL2005)	Running
B Protocols for SQL2005	SQL Server Reporting Services (SQL2005)	Running
⊞ . SQL Native Client Configuration	SQL Server Agent (SQL2005)	Stopped
	🐻 SQL Server Browser	Running
	•) I

5. In the SQL Server Services section, verify that the SQL Server Browser service is started. If it is not, double-click on the service to open the service properties.

SQL Server Browser Properties	? ×
Log On Service Advanced	
Log on as: Built-in account: Local Service	
C This account: Account Name:	Br <u>o</u> wse
Service status: Running <u>Start</u> Stop <u>P</u> ause	<u>R</u> estart
OK Cancel Apply	Help

6. Click on the **Service** tab and make sure the **Start Mode** is set to "Automatic".

BI	inary Path	"C:\Program Files\Microsoft SQL Se
E	rror Control	1
E	xit Code	0
Н	lost Name	SERVER2003
N	lame	SQL Server Browser
P	rocess ID	2096
S	QL Service Type	SQL Browser
S	tart Mode	Automatic
S	tate	Automatic Disabled Manual

7. On the Log On tab, click on the Start button to start the service

SQL Server Browser Properties	? ×
Log On Service Advanced	
Log on as:	
<u>B</u> uilt-in account:	
Local Service	
C T <u>h</u> is account:	
Account <u>N</u> ame:	Browse
Password:	
Confirm password:	
Service status: Stopped	<u>H</u> estart
OK Cancel Apply	Help

Add Windows Firewall Exceptions

This step may not need to be performed if the Windows Firewall is turned off on the server.

Server 2003 (click here to go to the Server 2008 instructions)

1. Click on Start > Control Panel > Windows Firewall



2. On the Exceptions tab, click the Add Port button.

😻 Windows Firewall	×
General Exceptions Advanced	
Windows Firewall is blocking incoming network connections, except for the programs and services selected below. Adding exceptions allows some programs to work better but might increase your security risk.	
Programs and Services:	
Name	
✓ File and Printer Sharing	
Remote Desktop	
Add Program Add Port	
Display a notification when Windows Firewall blocks a program	
OK Cancel	

3. In the **Add a Port** dialog, enter a name for the exception entry and type "1433" for the port number. Click **OK**.

Use these settings number and protoc want to use.	to open a port ol, consult the	through Windows documentation for	Firewall. To I the program	find the port or service you
<u>N</u> ame:	TCP 1433			
Port number:	1433			
	⊙ <u>I</u> CP	C <u>U</u> DP		
Change scope	1	_	ок	Cancel

4. Add a second port exception for UDP 1434.

Add a Port				×
Use these settings number and protoc want to use.	to open a port I ol, consult the o	hrough Windo documentation	ws Firewall. To for the program) find the port n or service you
<u>N</u> ame:	UDP 1434			
Port number:	1434			
	O <u>I</u> CP	⊙ <u>U</u> DP		
Change scope]		OK	Cancel

5. Click the Add Program button then click the Browse button

Add a Program	×			
To allow communications with a program by adding it to the Exceptions list, select the program, or click Browse to search for one that is not listed.				
Programs:				
🔞 7-Zip File Manager				
🔄 Data Profile Viewer				
Patabase Engine Tuning Advisor				
🖤 Database Engine Tuning Advisor				
Database Update Wizard				
Contract Contract Deployment Wizard				
🕼 Deployment Wizard				
Execute Package Utility				
Import and Export Data (32-bit)				
E Internet Explorer				
	·			
Path: C:\Program Files\Z-Zip\ZzEM exe Browse				
	24			
-				
Change scope OK Cancel				

6. Browse to the SQL Server installation's Binn directory and select **sqlservr.exe**.



Browse				<u>?</u> ×
Look jn:	🗀 Binn	•	3 🖻 🖻 🖽	
My Recent Documents Desktop My Documents My Computer	DIITmp32 Resources Templates DatabaseMail.e: DCEXEC.EXE fdhost.exe fdlauncher.exe SQLAGENT.EXE SQLIOSIM.COM SQLIOSIM.EXE sqlmaint.exe sqlstubss.exe xpadsi.exe	xe		
My Network	File <u>n</u> ame:	sqlservr.exe	•	<u>Open</u>
	Files of type:	Applications (*.exe;*.com;*.icd)	•	Cancel

7. Close the Firewall dialog after making these additions.

Server 2008

1. Click on Start > Administrative Tools > Windows Firewall with Advanced Security

Microsoft Office Excel 2007	Control Panel	System Configuration		
SQL Server Configuration Manager	Administrative Tools	Windows Firewall with Advanced Security Windows Server Backup Con Win		
	Run Windows Security			
All Programs Start Search	0 à)			
🥂 Start 🛛 🛃 📰 🏉				

2. Click on Inbound Rules.



3. Click on New Rule.



4. Choose the **Port** radio button and click **Next**.


5. Leave the **TCP** option selected and type in port 1433. Click **Next**.



6. Leave the Allow the connection radio button selected and click Next.



7. Uncheck the **Public** checkbox (unless users are connecting using a public network location) and click **Next**.



8. Type a name and description for the exception and click **Finish**.

9. Repeat these steps to add a UDP port exception for port 1434.



10. Add a third new inbound rule for a program exception.

new Inbound Rule Wizar	d 🗙
Rule Type Select the type of firewall rule to	create.
Select the type of firewall rule to Steps: Program Action Profile Name	create. What type of rule would you like to create? Program Rule that controls connections for a program. Port Rule that controls connections for a TCP or UDP port. Predefined: BITS Peercaching Rule that controls connections for a Windows experience. C Custom Custom rule.
	Learn more about rule types

11. Click on the **Browse** button and browse to the SQL Server installation's Binn directory and select **sqlservr.exe**. Then click **Next**.

💮 Open			×
- MSSQL.1	MSSQL ▼ Binn ▼	🔻 😝 Search	
🔄 Organize 👻 📗 Views	▼ 📑 New Folder		0
Favorite Links Documents Recently Changed Desktop Period Computer Pictures Nusic Searches Public	Name FTERef Resources DatabaseMail90 FTSStub msftefd SQLAGENT90 Sqlmaint Sqlservr Sqlsubss90 xpadsi90	▼ Date modified ▼ Type 1/13/2012 4:05 PM File Folder 1/13/2012 4:05 PM File Folder 1/13/2012 4:05 PM File Folder 10/14/2005 4:31 Application 10/14/2005 4:34 Application 8/26/2005 5:00 PM Application 8/26/2005 5:00 PM Application 10/14/2005 4:51 Application 10/14/2005 4:51 Application 10/14/2005 4:51 Application 10/14/2005 4:51 Application 10/14/2005 4:52 Application 10/14/2005 4:53 Application 10/14/2005 4:53 Application	▼ Size ▼ Tag 17 KB 15 KB 15 KB 63 KB 91 KB 312 KB 312 KB 75 KB 28,095 KB 16 KB 48 KB 48 KB 16 KB 48 KB </th
Folders ^	4		
File name	sqlservr	Programs Open	(*.exe)



12. Leave Allow the connection selected and click Next.



13. Uncheck the **Public** checkbox (unless users are connecting using a public network) and click **Next**.



14. Type a name and description for the exception and click **Finish**.

Assign BizInsight Security to Users

Each BizInsight user's Windows account name must be added to a .users file in the admin shared directory in order for that user to perform any BizInsight action. You will use the License Administration Tool to perform these steps.

To assign BizInsight security to your users, do the following:

 On the server, double-click any content installer desktop icon. If the content installers were installed without desktop icons, browse to the installation directory and doubleclick the file named "BizNet Content Installer.exe". If the content installer was uninstalled, reinstall it.



If you do not want to reinstall the content installer, see "Manual Steps" on page 86.

2. Click on the **Admin Tool** button.

🖉 BizInsight Co	itent Installer	×
	Relevant Informati	on
Automatic Install		_
Manual Install Stages	Reporting Server Found	
Install Report Server	Scripts Have Been Run	
Create Report Server User	DataSet Content Found	
Run Script Files	MetaData Content Found	
	Function Content Found	
Deploy Data Set Content	Users Have Been Added by Admin Tool	
Depity DataSet Content	Settings Have Been Configured by Config Tool	
Deploy MetaData Content		
Deploy Function Content		
Admin Tool		
Config Tool		
Exit	5	2

3. Click on the ellipses and browse to the admin share folder of your BizInsight shared directory.

License Administration Tool - SERVER2008R2\linda	<u>- 0 ×</u>
Administration Path	-0
Network share where your license file is stored.	

4. Select your BizInsight license file and click Open.



5. Click on the **Validate License** button to check how many licenses you currently have. Your current license count will be displayed.

License Administration Tool - SERVER2003\Administrator	<u>- 0 ×</u>
Administration Path	
C:\BizInsightShare\AdminShare\BizInsight.lic	
Network share where your license file is stored. Validate License	
BizNet Software Test License Expiration 01/31/2029	
Developer 1 Designer 2 Viewer 2 DrillDown 2	
_	Exit

6. Click on the **Configure Users** button. The **Current Users** dialog will open.

🐝 License Administration Tool	- SERVER2008R2	linda	<u>_ ×</u>
Administration Path	🖉 Current Users		
C:\BizInsightShare\Admin\BizInsi	User Type	Users	
Network share where your license	Designer 💌	domain\linda	
	Designer 💌	domain \albert	
Validate License	Viewer 💌	domain \marilyn	
BizNet Software Test License	Viewer 🔽	domain\frank	
Expiration 01/31/2029	_		
Developer 1 Designer 2 Viewer 2 DrillDown 2			
	Add Row	Delete Row	Commit Changes

 You will now add your new BizInsight user and assign them a user type. Click on the User Type drop down and select the desired user type. If you want your user to be a Designer, choose Designer from the drop down list.

🖉 Current Users	_ 🗆 🗵	
User Type	Users	
Designer 💌	domainVinda	
Designer 💌	domain\albert	
Viewer 💌	domain \marilyn	
Viewer 💌	domain\frank	
•		
Designer Viewer DrillDown		
	-	

8. Type the user's name in the **Users** field in the format of domain\username.

WARNING Do **not** add your own login using the Admin Tool unless you know for sure that you have another login available with sysadmin rights to the SQL Server instance. Early versions of the content installer (pre version 1.6) will remove existing permissions for users, including those with sysadmin rights. Skip this step, if needed, to confirm sysadmin access will not be lost before proceeding.

🖉 Current Users			
User Type		Users	
Designer	▼	domain∖linda	
Designer	▼	domain\albert	
Viewer	▼	domain \marilyn	
Viewer	▼	domain\frank	
Viewer	•	domain\winston	
	▼		

9. Click on the **Commit Changes** button when finished. You will be presented with a message asking if you want to grant the user additional security permissions. Click **Yes**.

Configuration Confirmation		X
Users must also be given additional for permissions. Would you like to do this now?	older permissions and Re	eport Server
	Yes	No

If you have entered more names for a particular user type than you have licenses, you will get an error similar to the following.



You will be returned to the **Current Users** dialog where you can remove a row so that you comply with the number of licenses your company purchased. Select the row to remove and click the **Delete Row** button.

To purchase additional licenses, use the BizNet Assistant button to open a support ticket indicating that you need to purchase additional licenses.



When you receive your new license, move your old license from the Administration Path shared directory and save the new license there. Do not rename the old license and leave it in the Administration Path; it must be removed from the directory in order for the new license count to take effect.

Manual Steps

1. In the Admin shared directory, open the .users file with Notepad that corresponds with the BizInsight permissions the user should have. For example, if the user should have Designer permissions, you would open the Designer.users file.

Tip If you are not sure where to find the Admin shared directory, go to an existing user's workstation, open Excel and click on the **Application Settings** button on the BizInsight ribbon and copy the path provided for the Administration Path.

2. In the .users file, add the Windows account name of the BizInsight user. For more information on the different user types, refer to the User Types section of the User Guide.



3. Save and close the file.

IMPORTANT As you add Windows account names to the .users files, add only as many as you have licenses. If you add more Windows account names than you have licenses or you have an extra line return in the file, users will get an error message similar to the following when they open Excel after BizInsight is installed.



If you are not sure how many licenses you have, open the .lic file that is in the Admin

shared directory with Notepad and check how many licenses are shown for the user type you are adding.

To purchase additional licenses, use the BizNet Assistant button to open a support ticket indicating that you need to purchase additional licenses.



When you receive your new license, move your old license from the Administration Path shared directory and save the new license there. Do not rename the old license and leave it in the Administration Path; it must be removed from the directory in order for the new license count to take effect.